



**USAID**  
FROM THE AMERICAN PEOPLE

# PREPARING FOR YOUR USAID POST-AWARD ORIENTATION CONFERENCE

“How to Work with USAID” Training Series

Visit [WorkwithUSAID.org](https://www.WorkwithUSAID.org) to learn more.



# LEARNING OBJECTIVES



- Review best practices as you prepare for your post-award conference.
- Understand what to expect regarding the participants and the purpose of the meeting.
- Discover how to use this opportunity to better manage your award and enhance your partnership with USAID.

# WHY USAID PARTNERS WITH ORGANIZATIONS

## **USAID Mission:**

To lead the U.S. Government's international development and disaster assistance efforts.

**USAID offers this assistance on behalf of the American people through partnerships and investments that:**

- Save lives;
- Reduce poverty;
- Strengthen democratic governance; and
- Help people emerge from humanitarian crises and progress beyond assistance.



# RULES AND REGULATIONS

**Two sets of general regulations govern USAID awards.**

## **U.S. GOVERNMENT REGULATIONS**

- The **Code of Federal Regulations (CFR)** governs how USAID issues acquisition and assistance awards.
- **Federal Acquisition Regulations (FAR)** include primary rules that guide how U.S. Government agencies acquire supplies and services.

## **USAID INTERNAL POLICIES**

- The **Automated Directives System (ADS)** outlines operational policies covering all Agency and partner activities. Assistance awards are governed by **ADS Chapter 303: “Grants and Cooperative Agreements.”** Acquisition awards are governed by **ADS Chapter 302: “Direct Contracting.”**
- **USAID Acquisition Regulations (AIDAR)** govern how USAID administers public funds.

# YOUR USAID CONTACTS

## ASSISTANCE AWARDS

(Grants and Cooperative Agreements)

- **Agreement Officer (AO)** has the authority to enter into, administer, and terminate award agreements. The AO is able to change an award's statement of work, period of performance, and requirements.
- **Agreement Officer's Representative (AOR)** is your main point of contact with USAID and monitors your progress and verifies that the activities conform to the award agreement.

## ACQUISITION AWARDS

(Contracts)

- **Contracting Officer (CO)** has the authority to enter into, administer, and terminate award agreements. The CO is able to change an award's statement of work, period of performance, and requirements.
- **Contracting Officer's Representative (COR)** is your main point of contact with USAID and is responsible for technical oversight and administration of the award.

**Read your award Designation Letter to understand the role of your AOR or COR.**



**PREPARE FOR YOUR CONFERENCE**

# THE MOST CRITICAL STEP: READ YOUR AWARD

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**Prepare for your post-award conference  
by reading your award in full.**

In advance of the meeting, provide the  
award documents to all key personnel  
from your organization.



# REVIEW AWARD REQUIREMENTS



**As you examine your award, take notes on requirements.**

You can expect to find sections on:

- Roles of Agency staff and your organization's staff;
- Statement of work;
- Supplies and services;
- Inspections;
- Deliveries or performance;
- Any special contract requirements; and
- Attachments related to the administration of your project.

# ASK QUESTIONS

**Prepare any questions and send them to your AOR or COR in advance.**

**Consider these questions as you read your award:**

- Who from USAID receives my deliverables, and when are they due?
- How will my organization be paid or reimbursed by USAID?
- When and how should my organization ask for an additional obligation?
- What are the tax (VAT) requirements for my award?
- When and how do I need to seek approvals from my CO, AO, or their representative?
- What audits are required by USAID?
- Are there formats for deliverables and invoice submissions—or any templates I should use?

**Note the following actions you should take immediately:**

- Make a list of required deliverables with deadlines; and
- Map out a timeline for the project.



# WHAT TO EXPECT

# MEET RELEVANT PERSONNEL

## USAID

- CO or AO and COR or AOR;
- Financial Management Office representative;
- Environmental compliance representative;
- Program or technical staff; and
- Development outreach and communication representative.

## YOUR ORGANIZATION

- Chief of party or team leader and their relevant deputies;
- Finance and operations manager;
- Staff members who will provide primary administrative oversight for the project; and
- Any key personnel.

**Ensure sub-partners are kept informed and participate in post-award activities.**

# WHAT WILL BE COVERED

## Your AO or CO and their representative will outline expectations for:

- Work and management plans;
- Monitoring, evaluation, and learning (MEL) plan;
- Quarterly, annual, and final reports;
- Branding and marking requirements; and
- Financial reporting and invoicing.

Your organization may share plans for hiring, office infrastructure, and follow-up meetings.

**Learn more about these topics through the full [USAID training series](#) and at [WorkwithUSAID.org](https://www.workwithusaid.org).**

# BUILD YOUR RELATIONSHIP WITH USAID CONTACTS

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A positive working relationship between you and your COR or AOR ensures smooth collaboration throughout implementation of your award.



# UNDERSTAND COMMUNICATION PREFERENCES

**Establish communications practices that encourage successful coordination and facilitate helpful feedback.**

Ask your COR or AOR:

- What types of meetings are needed?
- How frequently should you meet?
- What are their preferred communication tools?
- Who else should be included in your meetings with USAID?



# GAIN DETAILED GUIDANCE

**Good implementation starts with a comprehensive understanding of the operating environment and USAID's goals.**

Ensure that your understanding of the local context aligns with USAID's strategies for the region—before the meeting:

- Read the Mission's Country Development Cooperation Strategy (CDCS);
- Study current political and economic events in the country; and
- Prepare questions to ask USAID staff about their understanding of the environment.

# CONFIRM DETAILS AND PROCESS



- **Clarify deliverables and deadlines.** Pay special attention to deliverables due in the first few months.
- **Ask if there are templates** USAID recommends you use for each deliverable.
- **Discuss preferences for reviewing drafts** so your AOR or COR can provide feedback before final submission dates.



**AFTER THE CONFERENCE: NEXT STEPS**

# NOTES AND FOLLOW-UP

- Designate at least one team member from your organization to **take notes**.
- Afterward, **share the consolidated notes** with all participants, including those from USAID, to ensure everyone has the same understanding.
- You may **share the plan** for your award with the rest of the Mission, Bureau, or Operating Unit. Always copy your AOR or COR on *any* communication with USAID.
- **Debrief with your full team**—including any sub-partners—so the deliverables and due dates are clear for all responsible.

# SUMMARY OF KEY POINTS

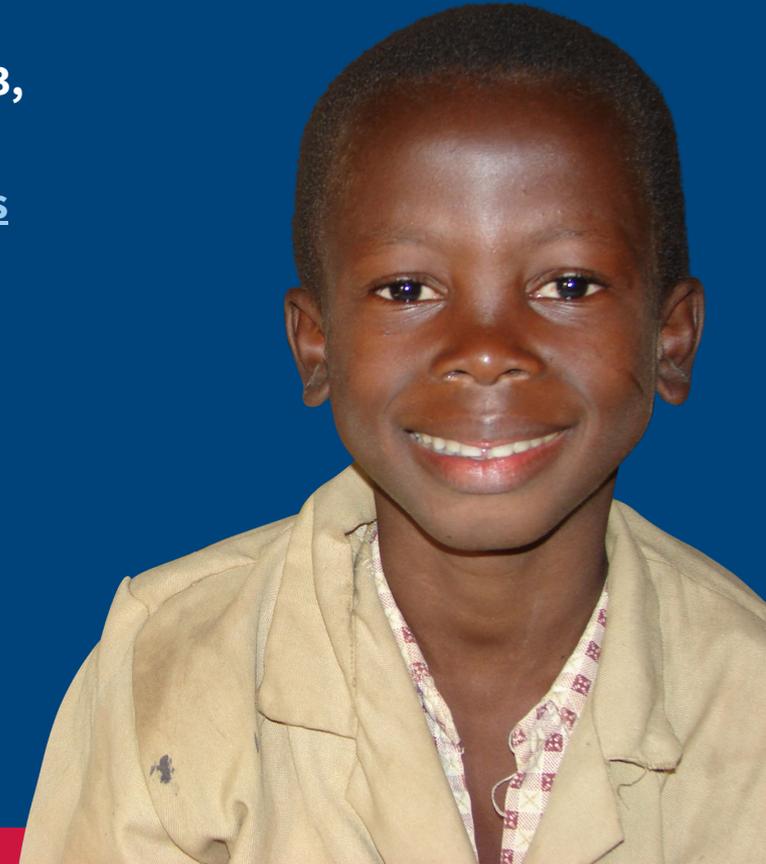
- **Read** your award.
- Prepare yourself for the conference by reviewing **who you will meet** and **what will be covered** at the conference.
- Take the opportunity to ask any and all **questions**.
- Establish a foundation for **effective working relationships**.
- Understand **roles and responsibilities**.



# RESOURCES

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- **ADS: Chapter 302, “[Direct Contracting](#)”; Chapter 303, “[Grants and Cooperative Agreements](#)”**
- **USAID’s “[Acronym Soup](#)” and [Glossary of ADS Terms](#)**
- **[Country Development Cooperation Strategy](#)**
- **[Elements of Compliance Quick Reference Guide](#)**
- **“How to Work with USAID” training series:**
  - **[“Building Strong Sub-Partnerships”](#)**
  - **[“Monitoring, Evaluation, and Learning”](#)**
  - **[“Branding and Marking”](#)**
  - **[“Preparing Progress Reports”](#)**
  - **[“Financial Reporting”](#)**



A photograph of an elderly woman with a warm smile, wearing a blue headscarf and a brown jacket. She is carrying a yellow basket on her back and holding a wooden stick. The background shows a lush green tea plantation on a hillside. A dark blue horizontal band with the text "Thank You" is overlaid on the image.

**Thank You**



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This module was produced by the United States Agency for International Development. The presentation team includes staff from both USAID and the Partnerships Incubator.

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Email questions and feedback: **[IndustryLiaison@usaid.gov](mailto:IndustryLiaison@usaid.gov)**



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